



**KERN INSTITUTE**  
FOR THE TRANSFORMATION OF MEDICAL EDUCATION

***Understanding  
Medical Professional Identity Formation  
and Character Development  
Symposium***

**April 30, 2021 9:00am-1:00pm CST  
Hosted virtually by the Kern Institute at the  
Medical College of Wisconsin  
Milwaukee, Wisconsin**

## **Schedule – Program Descriptions Available Below**

**9:00am Keynote Address** – Adina Kalet, MD, MPH

**“It Is About Trust: Why We Need To Measure Medical Professional Identity  
And Character Development”**

**10:00am Concurrent workshops (Please choose one)**

**“The Nature of Learning Communities and the Goals of Medical Education”**

David Hatem, MD, William Agbor-Baiye, PhD, Kurt Pfeifer, MD, Maya G. Sardesai, MD, M.Ed

**“Curricular Approaches to Facilitating Professional Identity Formation”**

Lynn Buckvar-Keltz, MD and Adina Kalet, MD, MPH

**“Minding What Matters: A Learner-Centered Coaching Process for Professional Identity  
(Trans)formation”**

Verna Monson, PhD, Aja King, Ed.D, LPCC, Cedric Weatherspoon, MA, Candidate EdD, LMFT

**11:30am Break**

**11:45am Interest Group Discussions (Please choose one)**

**“Conducting Research in Professional Identity Formation”**

Facilitated by Adina Kalet, MD, MPH

**“Reflection, Narrative, and Professional Identity Formation”**

Facilitated by Penelope Lusk, MS

**“Philosophies of Professional Identity Formation and Character Development”**

Facilitated by Fabrice Jotterand, PhD

**“Professional Identity Formation Across the Health Professions”**

Facilitated by Verna Monson, PhD

**12:45pm Closing Remarks**

## **Keynote Address (9:00AM-10:00AM)**

### **“It Is About Trust: Why We Need to Measure Medical Professional Identity and Character Development”**

Determining when and if a novice physician should be trusted to care for patients is based on the character and competence of both the learner and the teacher. In this talk, Dr. Kalet will share work she and colleagues have done to measure what we, medical educators, mean when we say that physicians can be entrusted. Even though “trust judgements” are idiosyncratic and highly context dependent educators with accumulated experience, wisdom, and courage can be trusted to make good judgements about learners when buoyed by benchmarked performance metrics in the context of coaching relationships. She will argue that a strong internalized medical professional identity is validly measurable and is foundational to being a trustworthy physician.

**Adina Kalet, MD, MPH** is the Steven and Shelagh Roell Endowed Chair, Director of the Robert D. and Patricia E. Kern Institute for the Transformation of Medical Education at the Medical College of Wisconsin. A general internist and medical education researcher, she has written extensively on communication skills, assessment, remediation, mentoring, professional identity formation and character development in medical education. She invites you to follow our work by reading the Kern Institute’s weekly Transformational Times newsletters, see our blog, follow us on Twitter @AKaletMD and consider reading the book she edited entitled Remediation in Medical Education at <https://www.springer.com/us/book/9781461490241>.

### **Robert D and Patricia E. Kern Institute for the Transformation of Medical Education**

The Robert D. and Patricia E. Kern Institute for the Transformation of Medical Education was established as an academic Department within Medical College of Wisconsin in 2017 with a substantial gift from the Kern Family Trust and Kern Family Foundation. The Institute conducts scholarship and research, builds innovative programs, provides consultations and convenes important conversations. With 34 faculty and 10 staff and two post-doctoral fellows organized in 5 Stakeholder Pillars (Student, Resident, Faculty, Curriculum and Community) and 3 Laboratories (Data Science, Human Centered Design and Philosophies of Medical Education Transformation) Kern aims to create a community of medical education leaders guided by our triple aim for Medical Education which focuses on character, competence, and caring. In 2020, we launched a Faculty Scholars Program and Post-Doctoral Fellowship and in 2021 we will be funding collaborations among medical schools to transform medical education.

## **Concurrent Workshops (10:00AM-11:30AM)**

### **The Nature of Learning Communities and the Goals of Medical Education**

#### **Workshop Leaders**

**David Hatem MD**, is a General Internist and a Professor of Medicine at the University of Massachusetts Medical School. He is the Founding Co-Director of Learning Communities at UMass.

**William Agbor-Baiyee PhD**, is an Associate Professor of Medical Education and Assistant Dean for Educational Research and Student Learning at Chicago Medical School at Rosalind Franklin University.

**Kurt Pfeifer MD**, is a general internist at the Medical College of Wisconsin where he also serves as a faculty member in the Kern Institute. His work in the Kern Institute has focused on coaching in medical education and learning community development.

**Maya G. Sardesai MD, M.Ed.**, is an Otolaryngologist - Head & Neck Surgeon at the University of Washington. She is an Associate Professor and Assistant Dean for Student Development at the University of Washington School of Medicine.

#### **Workshop Description**

Medical Education integrates students into medical settings and medical culture. How explicit medical schools are about the acculturation process can vary. As recognition of this acculturation process advances, a literature about the hidden curriculum, the learning environment, and professional identity formation is emerging. Our aim in this workshop is to discuss the importance of how students are supported in their professional journey during medical school, considering not only personal supports but also how our institutions are structured, and how the framing of outcomes of medical education influence the Professional Identity Formation of our learners.

#### **Objectives**

1. Employ a case narrative of a learner challenge in their medical education to foster discussion of the hidden curriculum, the learning environment and learner professional identity formation.
2. Discuss how the goals of medical education at our institutions influence how we organize to support those goals.
3. Demonstrate understanding of how institutional structures including Learning Communities can promote Professional Identity Formation.

## **Curricular Approaches to Facilitating Professional Identity Formation**

### **Workshop Leaders**

**Lynn Buckvar-Keltz MD**, is a General Internist, an Associate Professor of Medicine, Associate Chair for Professional Development, and the Director of Violet Society Program (Mentor and Career Advisor Program for Medical Students) at the New York University Grossman School of Medicine.

**Adina Kalet MD, MPH**, is Director, Robert D. and Patricia E. Kern Institute for the Transformation of Medical Education and Stephen and Shelagh Roell Endowed Chair at the Medical College of Wisconsin.

### **Workshop Description**

Professional identity formation (PIF) is a key outcome of medical education, but there is no standard explicit curriculum to support PIF and professional development in medical school. As the literature continues to reflect research in PIF and the conversation around professional development continues to grow, building and assessing strong curricula will be a critical step in supporting students and trainees. This workshop aims to provide an overview of the history of teaching professionalism and PIF, and to provide a case study of how one PIF curriculum was developed, alongside discussion of how we can continue to support student PIF and professional development through curricula in medical school and beyond.

### **Objectives**

- 1) Understand and critique one school's story of moving from a professionalism to a PIF curriculum.
- 2) Discuss major barriers and challenges to PIF curricula.
- 3) Create plans for how participants might enhance, change, or propose curriculum at their home institutions.

## **Minding What Matters: A Learner-Centered Coaching Process for Professional Identity (Trans)formation**

### **Workshop Leaders**

**Verna Monson, PhD**, is an adult developmental psychologist, PIF researcher, and expert in the Professional Identity Essay methodology. She is a practicing coach-facilitator of the Immunity to Change process applied to remediation of professionalism lapses in medical school.

**Aja Dionna King, EdD., LPCC**, is an experienced mental health therapist and organizational development consultant and trainer, practicing in Minneapolis-St. Paul. Her doctoral thesis examined PIF and gender in healthcare related to organizational climate.

**Cedric Weatherspoon, MA, Candidate EdD, LMFT**, is the CEO of Empower Therapeutic Services, a practicing mental health therapist, and an organizational development consultant and trainer in the Minneapolis-St Paul metro area. His doctoral research is focusing on professional identity curriculum using mask making, and coaching for remediation of professionalism lapses.

### **Workshop Description**

How can medical schools can implement a learner-centered approach to professional identity formation (PIF) in the curriculum? We discuss PIF as a developmental process in which coaching guides the learner using feedback from the Professional Identity Essay (PIE) related to their beliefs and assumptions about the role of physicians in society. Our coaching process addresses common concerns among medical students related to imposter syndrome, self-care, interpersonal conflict, and making sense of racism, gender bias, and other forms of bias. Our approach addresses a gap in the literature on how medical schools can design effective coaching programs and equip the faculty coach with tools to engage the learner in defining and implementing a meaningful, manageable, and personalized PIF development plan. This workshop will introduce the PIE, a template for the PIF Developmental Plan, and provide a case vignette to illustrate how our coaching process works.

### **Objectives**

- 1) Understand the developmental model of PIF in medical education and coaching.
- 2) Become familiar with the PIE as an assessment of PIF and how developmental feedback is used to frame the coaching engagement between faculty and the learner.
- 3) Discuss how PIF coaching can be integrated into the professionalism curricula and extra-curricular opportunities in service to the community, wellness, or research.
- 4) Discuss a case vignette to illustrate how the PIF coach can engage the learner in defining and implementing a meaningful, manageable, and personalized PIF development plan.

## **Interest Group Discussions (11:45-12:45PM)**

The interest group discussions are an informal opportunity to connect with colleagues and experts in the field on areas of interest in the field of PIF. Bring your lunch!

### **“Conducting Research in Professional Identity Formation”**

Join colleagues in a discussion of methods, assessments, and research agendas around PIF.

*Facilitated by Adina Kalet, MD, MPH – Director, Robert D. and Patricia E. Kern Institute for the Transformation of Medical Education and Stephen and Shelagh Roell Endowed Chair at MCW.*

#### **Recommended Reading:**

Kalet A, Buckvar-Keltz L, Harnik V, Monson V, Hubbard S, Crowe R, Song HS, Yingling S. Measuring professional identity formation early in medical school. *Med Teach*. 2017 Mar;39(3):255-261. doi: 10.1080/0142159X.2017.1270437.

Tagawa, M. Scales to evaluate developmental stage and professional identity formation in medical students, residents, and experienced doctors. *BMC Med Educ* 20, 40 (2020). <https://doi.org/10.1186/s12909-020-1942-y>

### **“Professional Identity Formation Across the Health Professions”**

PIF is not unique to medicine – converse with colleagues interested in how PIF develops across the health professions.

*Facilitated by Verna Monson, PhD – adult developmental psychologist and professional identity formation researcher.*

#### **Recommended Reading:**

Lewin LO, McManamon A, Stein MTO, Chen DT. Minding the Form That Transforms: Using Kegan's Model of Adult Development to Understand Personal and Professional Identity Formation in Medicine. *Acad Med*. 2019 Sep;94(9):1299-1304. doi: 10.1097/ACM.0000000000002741. PMID: 31460919.

Paradis E, Whitehead CR. Beyond the Lamppost: A Proposal for a Fourth Wave of Education for Collaboration. *Acad Med*. 2018 Oct;93(10):1457-1463. doi: 10.1097/ACM.0000000000002233. PMID: 29620672; PMCID: PMC6159689.

### **“Reflection, Narrative, and Professional Identity Formation”**

Discuss the use of reflection tools and narrative theory in supporting and understanding PIF.

*Facilitated by Penelope Lusk, MS in Narrative Medicine – Research Associate at NYU University Grossman School of Medicine, 2020-2021 Fulbright scholar at the University of Exeter.*

#### **Recommended Reading:**

DasGupta S. Narrative humility. Lancet. 2008 Mar 22;371(9617):980-1. doi: 10.1016/s0140-6736(08)60440-7. PMID: 18363204.

de la Croix A, Veen M. The reflective zombie: Problematizing the conceptual framework of reflection in medical education. Perspect Med Educ. 2018 Dec;7(6):394-400. doi: 10.1007/s40037-018-0479-9. PMID: 30353284; PMCID: PMC6283773.

Wald HS. Professional identity (trans)formation in medical education: reflection, relationship, resilience. Acad Med. 2015 Jun;90(6):701-6. doi: 10.1097/ACM.0000000000000731.

### **“Philosophies of Professional Identity Formation and Character Development”**

Discuss the different perspectives and philosophies of PIF and character development that shape medical education and broader thought.

*Facilitated by Fabrice Jotterand, PhD – Professor of Bioethics and Medical Humanities and Director of the Graduate Program in Bioethics at the Medical College of Wisconsin.*

#### **Recommended Reading:**

Cruess RL, Cruess SR, Boudreau JD, Snell L, Steinert Y. A schematic representation of the professional identity formation and socialization of medical students and residents: a guide for medical educators. Acad Med. 2015 Jun; 90(6):718-25.

### **Closing Remarks (12:45-1:00PM)**

*THANK YOU for joining the symposium on medical professional identity formation and character development! We look forward to continuing these important discussions.*